

**SUMMARY OF THE  
ON-SITE ASSESSMENT COMMITTEE MEETING  
MARCH 2, 2001**

The On-site Assessment Committee of the National Environmental Laboratory Accreditation Conference (NELAC) met by teleconference on Friday, March 2, 2001, at 1:00 p.m. Eastern Standard Time (EST). The meeting was led by its chair, Mr. William Ingersoll of the U.S. Navy. A list of action items resulting from the meeting is given in Attachment A. A list of participants is given in Attachment B. *The purpose of the meeting was to discuss Appendix B-2, Appendix A, and proposed changes to Chapter 3 of the NELAC Standard.*

**INTRODUCTION**

Participants experienced some difficulty accessing the teleconference line due to an apparent misunderstanding in scheduling the teleconference time. Mr. Ingersoll indicated that he would investigate the misunderstanding and reschedule the committee's previously scheduled teleconferences as necessary. After all participants had accessed the line, Mr. Ingersoll directed their attention to the documents for discussion, which had been distributed electronically prior to the meeting.

**APPENDIX B-2 (REDESIGNATED APPENDIX D)**

The committee revisited Appendix B-2 with discussion of language drafted by Mr. Alfredo Sotomayor. There was spirited discussion of the perceived purpose of the appendix. The primary question was whether the appendix is intended to provide guidance with respect to what an assessor must do or with respect to what a trainer must train an assessor to do. Mr. Sotomayor indicated that he had noted more emphasis on review of documentation through description of the standard operating procedure (SOP) than on evaluation of performance. At least one committee member expressed the opinion that Chapter 3 is deficient in guidance for assessors on how to actually perform an assessment. After extensive discussion the committee agreed that the purpose of the appendix is to provide such guidance by expanding on Section 3.6.1 g to describe the critical performance elements that the assessor must review for test methods and SOPs. A critical performance element was defined as one that directly affects the defensibility of the quality of the data. The committee agreed to place a reference to the appendix in Chapter 3 immediately after section 3.6.1 g (Areas of Assessment - Test Methods and Standard Operating Procedures). Although the appendix is not a training standard, it was agreed that its inclusion with Appendix B-1 may cause some confusion in that area. The committee agreed, therefore, to redesignate the appendix as Appendix D to minimize such confusion. Although there were suggestions for titles for Appendix D, the committee did not come to consensus on a title.

**REVIEW OF FOUR APPENDICES**

The committee briefly reviewed the purpose of each of its four appendices. Although there was some discussion of bundling two or more appendices together, the committee was in general agreement that it would probably be better to maintain four separate appendices to preserve as much information as possible in the event that an appendix is cut from Chapter 3 in the future.

Appendix A provides a standard for basic training for assessors. Appendix B provides a standard for technical training for assessors. Appendix C provides a standard for the conduct of an on-site assessment and addresses what an assessor must do from the time of assessment planning through the issuance of the corrective action report. The committee agreed to place a reference to Appendix C in Chapter 3 immediately after Section 3.4 (Pre-assessment Procedures). Appendix D provides a standard for the evaluation of the critical performance elements of test methods and SOPs during an on-site assessment.

Ms. Mimi Uhlfelder, chair of the Appendix C subcommittee, was unable to participate in the teleconference. On her behalf Mr. Ingersoll informed the committee that she has been working on Appendix C and will soon send a draft to the other members of the subcommittee (Mr. Sotomayor and Mr. Richard Sheibley) for their review.

## **APPENDIX A**

Mr. Ingersoll directed the committee's attention to Ms. Marlene Moore's recommended changes to Appendix A. Ms. Moore was unavailable to participate in the teleconference. In her absence it was noted that the document has been made very inclusive by bringing together elements from many different sources. The committee agreed that the end product is in need of editing for organization and consolidation. There was some disagreement about the extent to which course logistics are included in the document. Noting the March 19 deadline for submission to EPA of documents for publication for the Seventh NELAC Annual Meeting (NELAC 7), Mr. Ingersoll asked for committee input as to whether Appendix A is ready for presentation to the Conference. Since Ms. Moore will be traveling during the first two weeks in March, Ms. Rosanna Buhl and Mr. Sotomayor agreed to reorganize the document for presentation to the Conference.

## **PROPOSED CHANGES TO CHAPTER 3**

The committee had approved the addition of references to Appendices C and D in their discussion of the appendices earlier in the meeting. They began a section-by-section review of changes proposed by Ms. Buhl. The committee agreed to the addition of a footnote to Section 3.1 (Introduction) to define "assessment team." The footnote reads as follows:

An assessment team is comprised of a lead assessor, and one or more assessors or technical specialists. In some cases a single lead assessor may conduct an on-site assessment. In those instances the single assessor is considered the "team."

The committee also agreed to the modification of Section 3.2.1 (Basic Qualifications).

Since the committee's allotted teleconference time had almost come to an end, Mr. Ingersoll asked committee members to review the proposed changes to Chapter 3 and to continue their discussion of the changes via e-mail.

## **CONCLUSION**

Although the committee's next meeting was originally scheduled for March 14, 2001, via teleconference, Mr. Ingersoll noted that he would have to reschedule due to the miscommunication with the EPA teleconferencing system. Committee members indicated that it would be more convenient to meet on March 16, 2001, and Mr. Ingersoll agreed to try to reschedule for March 16. He will notify committee members with details when the meeting has been rescheduled. There being no more new business, Mr. Ingersoll adjourned the meeting shortly before 2:30 p.m. EST.

**ACTION ITEMS  
ON-SITE ASSESSMENT COMMITTEE MEETING  
MARCH 2, 2001**

<b>Item No.</b>	<b>Action</b>	<b>Responsible Member</b>	<b>Date to be Completed</b>
1.	Appendix C subcommittee will review draft appendix.	M. Uhlfelder, A. Sotomayor, R. Sheibley	03/16/01
2.	Committee will reorganize Appendix A for presentation at NELAC 7.	R. Buhl, A. Sotomayor	03/16/01
3.	Committee will review proposed changes to Chapter 3 and exchange ideas via e-mail.	All	03/16/01
5.	Committee will reschedule upcoming teleconferences; Mr. Ingersoll to communicate details.	W. Ingersoll	03/16/01

**PARTICIPANTS  
ON-SITE ASSESSMENT COMMITTEE MEETING  
MARCH 2, 2001**

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